SENATORS AND OFFICERS POST-TRAVEL DISCLOSURE OF TRAVEL EXPENSES

Date/Time Stamp:

This disclosure, along with a copy of the Private Sponsor Travel Certification Form and all attachments, MUST be provided to the Office of Public Records, Room 232 of the Hart Building, within 30 days after the travel is completed.

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March 3 - Sunda	ay, March 5, 201	17	<u>. </u>
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Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
\$0	\$188	\$170.30	\$20 (folder with materials)
anying Spouse or I	Dependent Child ((if applicable)	
	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
\$0		\$170.30	\$20 (folder with materials)
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(Revised 1/3/11)

Form RE-3

Invitation for Sen. Udall for the 2017 Bipartisan Congressional Health Policy Conference

Good morning, Devon.

On behalf of The Commonwealth Fund and the Alliance for Health Reform, I would like to invite Senator Udall to the 19th Annual Bipartisan Congressional Health Policy Conference for Members of Congress from March 3-5, 2017 in Warrenton, Virginia at The Airlie Center, only 60 minutes from the Capitol. This will be a unique opportunity for the Senator to have off-the-record discussions with colleagues from both sides of the aisle and both chambers.

The theme for the 2017 conference is "Achieving a Patient-Centered Health Care System."

Health policy is more complex than ever, and there is much at stake for the constituents of New Mexico and throughout every congressional district. In the midst of policy debates about the future of the U.S. health system, patients' perspectives often get lost. This year's conference will focus on the patients and how potential changes to health policies will impact their ability to access high-quality, affordable care. Each panel will feature some of the most renowned analysts, stakeholders, and officials in the field. They will also have representation from patients themselves. Our speakers will make brief remarks and set the stage for an open discussion between your boss and other members of Congress, allowing for in-depth bipartisan conversations with our experts and patient representatives as resources.

Additional information on panel topics, confirmed speakers, and logistics can be found at congressionalhealthpolicy.org/2017agenda.

The conference is organized and sponsored by The Commonwealth Fund and the Alliance for Health Reform. No government, corporate, or special interest funds are involved. The Alliance, through a grant from Commonwealth, will pay all expenses, including lodging and meals, for the Senator, a spouse or child, and one senior staff member. The Alliance will provide a shuttle service to Airlie from Capitol Hill for Members, their guest, and staff that will depart Friday afternoon and return to Capitol Hill on Sunday.

I hope that the Senator will be able to join us for this unparalleled opportunity. I encourage your staff to contact me with any questions or if any other additional information is needed. I can be reached via email at kappenzeller@allhealth.org or by phone at (202)789-2300.

We would appreciate the response by January 25 to ensure enough time for all arrangements and for the submission of all relevant ethics forms, which are due February 1, 2017.

Thank you again for considering our invitation. I hope that Senator Udall will be able to join us this March.

Best regards, Kelly

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

Spo	nsor(s) of the trip (please list all sponsors): Alliance for Health Reform a non-partisan 501(c)(3)
	lic charity and The Commonwealth Fund, a foundation that supports independent (continued)
Des	cription of the trip:
Date	es of travel: Friday, March 3 - Sunday March 5, 2017
Plac	e of travel: The Airlie Center, Warrenton, VA
Nan	ne and title of Senate invitees: See attached list of Senate Invitees
X	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal <u>and</u> do not retain or employ registered lobbyists or agents of a foreign principal <u>and</u> no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
X	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
l ce	rtify that:
X	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement.
×	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal

except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip.
	(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	The Alliance for Health Reform and The Commonwealth Fund jointly formulate the agenda, recruit appro-
	private speakers, and develop and compile resource materials for conference curriculum. Alliance staff
	also organize lodging, travel, and event management for the conference with input from the Fund.
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission: (see attached page)
	(000 ditabiled page)
14.	
	(see attached page)

(see attached page)			<u> </u>	
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		<u> </u>	<u> </u>	
Total Expenses for Ea	ach Participant:			
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
Good Faith estimate	\$26	\$188	\$170.30	\$20; folder w materials
☐ Actual Amounts				
State whether a) the toparticipation or b) the congressional participation	rip involves an event that trip involves an event to pation:	t is arranged or orga hat is arranged or or	nized without regar ganized specifically	rd to congressional with regard to
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Participation or b) the congressional participation. This trip is organized (see attached page) Name and location of Airlie; 6809 Airlie Ro	e trip involves an event to pation: I specifically with regard to the location of the event of hotel or other lodging for the event to the location of the event of hotel or other lodging for the lodging for the event to the lodging for the event lodging for the ev	to congressional paracility:	ganized specifically	with regard to

21.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:
	The lodging rate for Warrenton, VA according to GSA is \$94.00 per night. Our rates at Airlie are currently,
	\$94/night. Our meal costs are also within the GSA total for three days in Warrenton, VA.
22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:
	The Alliance will organize chartered buses to allow for members and staff to all meet at a central location
	on Capitol Hill for travel to/from Airlie to decrease costs. Members and staff may also drive themselves.
23.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).
24.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:
	NA
25.	I hereby certify that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.): Signature of Travel Sponsor:
	Name and Title: Sarah Dash, President and Co-CEO
	Name of Organization: Alliance for Health Reform
	Address: 1444 I St NW, Suite 910, Washington, DC 20005
	Telephone Number: (202)789-2300
	Fax Number:
	E-mail Address: sarahdash@allhealth.org

25. I hereby certify that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor):

Signature of Travel Sponsor:

Name and Title: David Blumenthal, President Name of Organization: The Commonwealth Fund Address: One E. 75th St. New York, NY 10021

Telephone Number: (212) 606-3500 Fax Number: (212) 606-3500 E-mail Address: db@cmwf.org

Continued answers from Questions 2, 13, 14, 15, 18, and 20

1. SPONSOR(S) OF THE TRIP (PLEASE LIST ALL SPONSORS)

Alliance for Health Reform, a non-partisan501(c)3 public charity, and The Commonwealth Fund, a foundation that supports independent research on health and social issues and makes grants to improve health care practice and policy.

2. DESCRIPTION OF THE TRIP:

The conference provides an opportunity for members of Congress and their senior health staff from both parties to learn more about timely health policy topics in informal, off-the-record sessions with a select group of health policy experts from a wide variety of perspectives. There is also ample opportunity for interchange among the Members of Congress in attendance. The event aims to educate, not to advance any political or ideological position.

13. BRIEFLY DESCRIBE THE STATED MISSION OF EACH SPONSOR AND HOW THE PURPOSE OF THE TRIP RELATES TO THAT MISSION:

The Alliance is a non-partisan, 501(c)(3) public charity dedicated to providing governmental leaders with expert analysis and information on current health care-related issues, solutions, legislative proposals and industry conditions. The Alliance has been a resource providing objective, fact-based, unbiased information to members of the Senate/House on both sides of the aisle since its inception in 1991. The Commonwealth Fund is a foundation that supports independent research on health and social issues and makes grants to improve health care practice and policy. Since the purpose of the trip is to educate leaders about the roots of the nation's health care problems and the competing proposals for changing the system in ways that will help improve health care practice and policy, the trip fits perfectly into the mission of both organizations.(allhealth.org) (cmwf.org)

14. BRIEFLY DESCRIBE EACH SPONSOR'S PRIOR HISTORY OF SPONSORING CONGRESSIONAL TRIPS:

This is the 19th Annual Bipartisan Congressional Health Policy Conference to which members of the Senate and House of Representatives have been invited and have participated. In all, there have been 50 unique members who have attended since the Alliance and The Fund began jointly sponsoring the event in 2006. From 1995-2005, The Commonwealth Fund sponsored the conference with the Kennedy School of Government at Harvard.

15. BRIEFLY DESCRIBE THE EDUCATIONAL ACTIVITIES PERFORMED BY EACH SPONSOR (OTHER THAN SPONSORING CONGRESSIONAL TRIPS):

The Alliance has a long history of performing educational activities. Since 1991, the Alliance has organized more than 500 forums in Washington and around the nation, each presenting a balance of expert views. The Alliance has published comprehensive guides for journalists on covering health issues and regularly produces online toolkits on current topics.

18. REASON FOR SELECTING THE LOCATION OF THE EVENT OR TRIP

The location was selected because of a need to balance proximity to Capitol Hill in order to accommodate the schedules of Members and staff and achieve our goal of reduced travel costs by allowing for bus or carpooling as the mode of transportation and yet be located outside of the Senate duty station. The Airlie is located in Fauquier County, Virginia.

The Alliance for Health Reform, in close collaboration with the Commonwealth Fund, undertook an extensive search of properties that met several key criteria:

- Location: Located a reasonable driving distance from Washington, D.C. and major airports for the convenience of Members of Congress and participating speakers, yet outside of the Washington, D.C. "duty station" for Members of Congress and their staff. The Airlie is located at 6809 Airlie Road in Warrington, Virginia, approximately 40-60 minutes from Dulles Airport (depending on traffic), and a 1-2 hour drive from the Capitol, depending on traffic. It is located in Fauquier County, Virginia. Other facilities we considered were either a significant driving distance from the
- Facilities and logistics: Conference facilities and rooming arrangements that can
 accommodate the conference; criteria include as space that can ensure safety and privacy for
 the Members, and any other high profile speakers that attend; meeting space and overnight
 accommodations that are located on the same property so as not to add additional travel time
 and distract from substantive programming; suitability of conference facilities and A/V capacity;
 and conference support staff that's suitable for hosting a conference as large and logistically
 complex as ours.

Cost: Reasonable costs that can meet the conference budget. The Alliance has negotiated the lowest possible food costs at Airlie, selecting the most reasonable food costs on the available menu. These are the market rates for conference facilities that meet all of our criteria.

• Timing: preferred date availability to coincide with anticipated congressional availability

After this extensive search and a site visit by Alliance and Fund staff, we believe Airlie is the best option for the 2017 conference.

Other facilities considered: A list of additional properties considered for the conference is shown below. Highlighted properties were visited but found not to have adequate facilities for our conference, and other conference facilities were assessed via internet and phone research. Many of the other venues listed do not have adequate facilities for our conference or are a longer drive from major airports than the Airlie, potentially creating an obstacle to attendance by Members of Congress, making it more difficult to recruit top-quality speakers, and increasing transportation costs. The other venues with appropriate facilities had comparable or more expensive food costs compared to the Airlie.

20. REASONS(S) FOR SELECTING HOTEL OR OTHER LODGING FACILITY

In addition to a location that met the goals described in 18, above, we sought a facility that was low cost yet had sufficiently capable conference facilities and staff with modern audio/visual accommodations. The Airlie meets those needs. It has an excellent reputation for its conference management services with a highly qualified staff. Yet it is by no means luxurious. It is modestly comfortable which will facilitate the number of hours that conference participants will participate in learning sessions and issue discussions.





Bipartisan Congressional Health Policy Conference Airlie Center, Warrenton, Virginia March 3-5, 2017

Achieving a Patient-Centered Health System

Friday, March 3

3:00 p.m.

Registration and Check-In Begin (Airlie House Lobby)

6:00-7:00 p.m.

Opening Reception (Pavilion)

7:00-9:00 p.m.

Dinner (Pavilion)

1a. Welcome and Introductions

Robert Graham, Chairman, Alliance for Health Reform Benjamin Chu, Chairman, The Commonwealth Fund; President and CEO, Memorial Hermann Health System

1b. Patients as Innovation Partners: A Charge for the Weekend

Keynote Speakers:

- Steven Keating, Patient Advocate
- Sharon Terry, President and Chief Executive Officer, Genetic Alliance

Moderator:

David Blumenthal, President, The Commonwealth Fund

Saturday, March 4

7:00 a.m.

Breakfast Buffet Opens (Jefferson Room)

8:00-8:45 a.m.

2. Breakfast Discussion: Building Delivery Systems with the Patient at the Center* (Federal Room)

*Breakfast will available next door in the Jefferson Room. Please feel free to enjoy breakfast in the Jefferson Room before the panel or to bring a plate into the Federal Room for the panel discussion.

Moderator:

Maureen Bisognano, President Emerita, Senior Fellow, Institute for Healthcare Improvement; Board Member, The Commonwealth Fund

Panelists:

- Whitney Bowman-Zatzkin, Director, Flip the Clinic
- K. Eric De Jonge, Director of Geriatrics, MedStar Washington Hospital
 Center

9:00-10:15 a.m.

3. Improving Care and Lowering Costs: Medicare's Role in Managing Chronic Disease (Federal Room)

Moderator:

Melinda Abrams, Vice President, Delivery System Reform, The Commonwealth Fund

Panelists:

- Kenneth Thorpe, Chairman, Partnership to Fight Chronic Disease; Robert
 W. Woodruff Professor and Chair, Department of Health Policy and
 Management, Rollins School of Public Health, Emory University
- Rebecca Onie, Co-Founder and Chief Executive Officer, Health Leads
- Adam Boehler, Co-Founder and Chief Executive Officer, Landmark Health

10:15-11:30 a.m.

4. Caring for Dually Eligible Medicare-Medicaid Patients (Federal Room)

Moderator:

Donald Moulds, Executive Vice President for Programs, The Commonwealth Fund

Panelists:

- Melanie Bella, Independent Consultant and Former Director, Medicare-Medicaid Coordination Office, Centers for Medicare and Medicaid Services
- Cindi Jones, Director, Department of Medical Assistance Services,
 Commonwealth of Virginia
- Toby Douglas, Senior Vice President for Medicaid Solutions, Centene Corporation

11:45-1:00 p.m.

5. Lunch Discussion: Prescription Drug Spending and Policy - Where Are We and Where Are We Headed? (Pavilion)

Keynote Speakers:

- Mark McClellan, Director and Robert J. Margolis, MD, Professor of Business, Medicine and Health Policy, Duke University
- Henry Waxman, Chairman, Waxman Strategies

Moderator:

Margaret Hamburg, Foreign Secretary, National Academy of Medicine; Former Commissioner, Food and Drug Administration; Board Member, The Commonwealth Fund

1:15-2:15 p.m.

6. Continuing the Conversation: Ensuring Patient Access to Affordable Prescription Drugs (Federal Room)

Moderator:

Shawn Bishop, Vice President, Controlling Health Care Costs and Advancing Medicare, The Commonwealth Fund

Panelists:

- Elizabeth Seeley, Adjunct Lecturer on Health Policy and Management,
 Harvard T.H. Chan School of Public Health
- Aaron Kesselheim, Associate Professor, Harvard Medical School; Faculty Member, Brigham and Women's Hospital
- Diana Zuckerman, President, National Center for Health Research

2:15-3:30 p.m.

7. Democratization of Health Data: Getting Usable Health Information in the Hands of Patients and Caregivers (Federal Room)

Moderator:

Eric Schneider, Senior Vice President for Policy and Research, The Commonwealth Fund

Panelists:

- Christine Bechtel, President, X4 Health
- Jeremy Marut, Director of Enterprise Architecture, Hackensack University
 Medical Center
- Jim Jirjis, Chief Health Information Officer and Vice President, Clinical Services Group, HCA
- Karen DeSalvo, Former Acting Assistant Secretary of Health, U.S.
 Department of Health and Human Services

6:30-7:30 p.m.

Reception (Pavilion)

7:30-9:00 p.m.

8. Dinner Keynote: Participant-Centered Innovation and Accelerating Precision Health For All (Pavilion)

Keynote Speaker:

• Eric Dishman, Director, All of Us Research Program, National Institutes of Health

Moderator:

Benjamin Chu, Chairman, The Commonwealth Fund; President and CEO, Memorial Hermann Health System

Sunday, March 5

8:00-9:00 a.m.

Breakfast Buffet (Jefferson Room)

9:00-10:30 a.m.

9. Charting the Future of Medicaid and the Role of the States (Federal Room)

Moderator:

Sheila Burke, Faculty Research Fellow, Malcolm Wiener Center for Social Policy; Adjunct Lecturer, John F. Kennedy School of Government, Harvard University; Board Member, The Commonwealth Fund

Panelists:

- Frederick Isasi, Former Director, Health Division, Center for Best Practices, National Governors Association
- Joe Moser, Director, Indiana Medicaid
- Thomas Betlach, Director, Arizona Health Care Cost Containment System

10:30-12:00 p.m.

10. Stabilizing the Private Insurance Market (Federal Room)

Moderator:

Sheila Burke, Faculty Research Fellow, Malcolm Wiener Center for Social Policy; Adjunct Lecturer, John F. Kennedy School of Government, Harvard University; Board Member, The Commonwealth Fund

Panelists:

- Joel Ario, Managing Director, Manatt Health
- Cori Uccello, Actuary and Senior Health Fellow, American Academy of Actuaries
- Avik Roy, President, Foundation for Research on Equal Opportunity
- Peter Lee, Executive Director, Covered California

12:00 p.m.

Closing Remarks

12:15 p.m.

Adjourn (boxed lunches available)

U.S. Senate

Committee on Ethics

PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressional Invitees for the Bipartisan Congressional Health Policy Conference
March 3-5, 2017

				larch 3-5, 2017
First Name	Last Name	Credentials		Reason for Invitation
Lisa	Murkowski		AK	Member of Committee on Health, Education, Labor & Pensions
Dan	Sullivan		AK	Member of Senate Veterans' Affairs Committee
Jeff	Sessions		AL	Member of the Senate Rural Health Caucus
Richard	Shelby		AL	Member of the Senate Cancer Coalition
John	Boozman		AR	Member of Senate Appropriations Committee
Tom	Cotton		AR	Member of Joint Economic Committee
Jeff	Flake		AZ	Member of Senate Judiciary Committee
John	McCain		AZ	Member of the Senate Rural Health Caucus
Kamala	Harris	·	CA	Member of the Senate Committee on Budget
Dianne	Feinstein	- 	CA	Member of the Senate Cancer Coalition
Michael	Bennet		CO	Member of Committee on Health, Education, Labor & Pensions
Cory	Gardner		co	Member of Senate Committee on Small Business and Entreprenuership
Richard	Blumenthal		CT	Member of Senate Judiciary Committee
Christopher	Murphy	···	CT	Member of Committee on Health, Education, Labor & Pensions
Thomas	Carper		DE	Member of Committee on Finance
Chris	Coons		DE	Member of Senate Appropriations Committee
Bill	Nelson		FL	Member of Committee on Finance
			· · · · ·	
Marco	Rubio		FL	Member of Senate Committee on Small Business and Entreprenuership
Johnny	Isakson		GA	Member of Committee on Health, Education, Labor & Pensions
David	Perdue		GA	Member of Senate Budget Committee
Mazie	Hirono		HI	Member of Senate Veterans' Affairs Committee
Brian	Schatz	- 	HI	Member of Senate Appropriations Committee
Charles	Grassley		IA	Member of Committee on Finance
Chanes	Grassiey		- "``	THOMBOT OF COMMITTEE TO THE TOTAL TO THE TOTAL TO THE TOTAL TO THE TOTAL TOTAL TO THE TOTAL TOTA
lani	Ernst		IA	Member of Senate Committee on Small Business and Entreprenuership
Joni Michael	Crapo	····	ID	Member of Committee on Finance
	Risch		ID	Member of Congressional Multiple Sclerosis Caucus
Jim	Durbin	-	IL IL	Member of the Senate Cancer Coalition
Richard	Duckworth		IL IL	Interest in Health Care
Tammy	Duckworth		<u> </u>	Member of Senate Committee on Health, Education, Labor, and
Tank	Va		IN	Pensions
Todd	Young		IN IN	Member of Coalition for Autism Research and Education (CARE)
Joe	Donnelly		KS	Member of Senate Appropriations Committee
Jerry	Moran	_ 	KS	Member of Committee on Health, Education, Labor & Pensions
Pat	Roberts		KY KY	Member of the Senate Rural Health Caucus
Mitch_	McConnell		KY	Member of Committee on Health, Education, Labor & Pensions
Rand	Paul	MD		Member of Committee on Health, Education, Labor & Pensions
Bill Elizabeth	Cassidy	MD	LA	Member of Committee on Health, Education, Labor & Pensions
Elizabeth	Warren	<u> </u>	MA	Member of Coalition for Autism Research and Education (CARE)
Edward	Markey		MA	Member of Coamittee on Finance
Benjamin	Cardin		MD	Member of Committee on Appropriations
Chris	Van Hollen		MD	Member of Committee on Appropriations Member of Committee on Health, Education, Labor & Pensions
Susan	Collins		ME	
Angus	King	<u> </u>	ME	Member of Senate Budget Committee
Gary	Peters		MI	Member of Joint Economic Committee
Debbie	Stabenow		MI	Member of Committee on Finance
AI	Franken		MN	Member of Committee on Health, Education, Labor & Pensions
Amy	Klobuchar		MN	Member of Senate Judiciary Committee
Roy	Blunt		MO	Member of Senate Appropriations Committee
Claire	McCaskill		MO_	Member of Congressional Caucus for Women's Issues
Thad	Cochran		MS	Member of the Senate Rural Health Caucus
Roger	Wicker		MS	Member of Senate Budget Committee
Steve	Daines		MT	Member of Senate Appropriations Committee
Jon	Tester		MT	Member of the Senate Rural Health Caucus

First Name	Last Name	Credentials	State	Reason for Invitation
Richard	Burr		NC	Member of Committee on Health, Education, Labor & Pensions
Thom	Tillis		NC	Member of Senate Judiciary Committee
John	Hoeven	<u> </u>	ND	Member of Senate Appropriations Committee
Heidi	Heitkamp		ND	Member of Senate Diabetes Caucus
Deb	Fischer		NE	Member of Congressional Caucus for Women's Issues
Ben	Sasse	-	NE	Member of Joint Economic Committee
Maggie	Hassan		NH	Member of Committee on Health, Education, Labor & Pensions
Jeanne	Shaheen	-	NH	Member of Senate Appropriations Committee
Robert	Menendez		NJ	Member of Committee on Finance
	O = stans		NJ	Member of Senate Committee on Small Business and Entreprenuershi
Cory	Booker	_		Member of Joint Economic Committee
Martin	Heinrich	<u> </u>	NM	
Tom	Udall		NM_	Member of Senate Appropriations Committee
Dean	Heller		NV_	Member of Committee on Finance
Catharine	Cortez Matso		NV NV	Member of Senate Special Committee on Aging
Charles	Schumer		NY	Member of Committee on Finance
Kirsten	Gillibrand		NY _	Member of the Congressional Task Force on Alzheimer's Disease
Sherrod	Brown		OH	Member of Committee on Finance
Rob	Portman		ОН	Member of Committee on Finance
James	Inhofe		OK	Member of the Senate Rural Health Caucus
James	Lankford		OK	Member of Senate Appropriations Committee
Jeff	Merkley		OR	Member of Senate Appropriations Committee
Ron	Wyden		IOR	Member of Committee on Finance
Bob	Casey		PA	Member of Committee on Health, Education, Labor & Pensions
Patrick	Toomey	<u> </u>	PA	Member of Committee on Finance
Jack	Reed		RI	Member of the Senate Cancer Coalition
Sheldon	Whitehouse		RI	Member of Committee on Health, Education, Labor & Pensions
Lindsey	Graham		SC	Member of the Senate Rural Health Caucus
Tim	Scott		SC	Member of Committee on Health, Education, Labor & Pensions
Mike	Rounds		SD	Member of Senate Veterans' Affairs Committee
John	Thune		SD_	Member of Committee on Finance
Lamar	Alexander		TN	Member of Committee on Health, Education, Labor & Pensions
Bob	Corker		<u> TN</u>	Member of the Senate Rural Health Caucus
John	Cornyn		TX	Member of Committee on Finance
Ted	Cruz		TX	Member of Joint Economic Committee
Orrin	Hatch		UT	Member of Committee on Health, Education, Labor & Pensions
Mike	Lee		UT	Member of Senate Judiciary Committee
Tim	Kaine		VA	Member of Senate Budget Committee
Mark	Warner		VA	Member of Committee on Finance
Patrick	Leahy		VT	Member of the Senate Rural Health Caucus
Bernard	Sanders		VT	Member of Committee on Health, Education, Labor & Pensions
Maria	Cantwell		WA	Member of Committee on Finance
Patty	Murray		WA	Member of Committee on Health, Education, Labor & Pensions
Tammy	Baldwin		WI	Member of Committee on Health, Education, Labor & Pensions
Ron	Johnson		WI	Member of Senate Budget Committee
Shelley	Capito		W	Member of Senate Appropriations Committee
Joe	Manchin		W	Member of Senate Veterans' Affairs Committee
	Barrasso	MD	WY	Member of the Senate Rural Health Caucus
John	Enzi		WY	Member of Committee on Health, Education, Labor & Pensions

Travel Certification Information List of Senate Invitees Page 2 of 2

U.S. Senate Committee on Ethics

PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressoinal Staff Invites for the Bipartisan Congressional Health Policy Conference

March 3-5, 2017

Mornhor	First Name	Last Name	Email	Title
Sen, Alexander (R-TN)	Mary-Sumpter	Lapinski	marysumpter_lapinski@help.senate.gov	Health LA
Baldwin (D	Kathleen	Laird	kathleen_laird@baldwin.senate.gov	Health LA
Barrasso	Jay	Eberle	jay_eberle@barrasso.senate.gov	Health LA
Bennet (D-	Rohini	Kosoglu	rohini_kosoglu@bennet.senate.gov	Health LA
Blumer	Laurel	Sakai	laurel sakai@blumenthal.senate.gov	Health LA
	Desiree	Mowry	desiree_mowry@blunt.senate.gov	Health LA
	Ashley	Eden	ashley_eden@booker.senate.gov	Health LA
	Jennifer	Humphrey	jennifer_humphrey@boozman.senate.gov	Health LA
Brown (D	Abigail	Duggan	abigail_duggan@brown.senate.gov	Health LA
•	Anna	Abram	anna_abram@help.senate.gov	Health LA
	Nico	Janssen	nico_janssen@cantwell.senate.gov	Health LA
	Dana	Richter	dana_richter@capito.senate.gov	Health LA
	Lauren	Jee	lauren jee@cardin.senate.gov	Health LA
Carper	Lynn	Sha	lynn_sha@carper.senate.gov	Health LA
Sen. Casey (D-PA)	Sara	Mabry	sara_mabry@casey.senate.gov	Health LA
Sen. Cassidy (R-LA)	Matthew	Gallivan	matt_gallivan@cassidy.senate.gov	Health LA
Cochran (R	Constance	Payne	constance_payne@cochran.senate.gov	Health LA
Sen. Collins (R-ME)	Priscilla	Hanley	priscilla_hanley@aging.senate.gov	Health LA
Sen. Coons (D-DE)	Jacqueline	Thomas	jacqueline_thomas@coons.senate.gov	Health LA
Sen. Corker (R-TN)	Hayly	Humphreys	hayly_humphreys@corker.senate.gov	Health LA
	Beth	Nelson	beth_nelson@cornyn.senate.gov	Health LA
	Jonathan	Hiler	jonathan_hiler@cotton.senate.gov	Health LA
Sen. Crapo (R-ID)	Kellie	McConnell	kellie_mcconnell@crapo.senate.gov	Health LA
Sen. Cruz (R-TX)	Alec	Aramanda	alec_aramanda@cruz.senate.gov	Health LA
Dain	Brad	Kehr	brad_kehr@daines.senate.gov	Health LA
Sen. Donnelly (D-IN)	Katie	Campbell	katie_campbell@donnelly.senate.gov	Health LA
Durbin (D-	Claire	Grant	claire_grant@durbin.senate.gov	Health LA
Enzi (R-W)	Elizabeth	Schwartz	elizabeth_schwartz@help.senate.gov	Health LA
Sen. Ernst (R-IA)	Andrea	Hechavarria	andrea_hechavarria@ernst.senate.gov	L
Sen. Feinstein (D-CA)	Megan	Thompson	megan_thompson@feinstein.senate.gov	Health LA

Committee on Ethics U.S. Senate

PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressoinal Staff Invites for the Bipartisan Congressional Health Policy Conference March 3-5, 2017

				ı
Sen. Fischer (R-NE)	Liz	Ruth	liz_ruth@fischer.senate.gov	Health LA
Sen. Flake (R-AZ)	Sarah	Towles	sarah_towles@flake.senate.gov	Health LA
Sen. Franken (D-MN)	Beth	Wikler	beth_wikler@franken.senate.gov	Health LA
Gardner (R-	Alison	Toal	alison_toal@gardner.senate.gov	Health LA
Sen. Gillibrand (D-NY)	Alyson	Kelly	alyson_kelly@gillibrand.senate.gov	Health LA
Sen. Graham (R-SC)	Jessica-Phillips	Tyson	jessica-phillips_tyson@lgraham.senate.gov	Health LA
Sen. Hassan (D-ME)	McKenzie	Bennett	mckenzie_bennett@hassan.senate.gov	Health LA
Sen. Hatch (R-UT)	Jay	Khosla	jay_khosla@finance.senate.gov	Policy Director
Sen. Hatch (R-UT)	Matthew	Richardson	matthew_richardson@hatch.senate.gov	Health LA
Sen. Heinrich (D-NM)	Louis	Agnello	louis_agnello@heinrich.senate.gov	Health LA
Sen. Heitkamp (D-ND)	Megan	DesCamps	megan_descamps@heitkamp.senate.gov	Health LA
	Emily	Wilkinson	emily_wilkinson@heller.senate.gov	Health LA
Sen. Hirono (D-HI)	Swarna	Vallurupalli	swarna_vallurupalli@hirono.senate.gov	Health LA
Sen. Hoeven (R-ND)	Shannon	Brown	shannon_brown@hoeven.senate.gov	Health LA
Sen. Inhofe (R-OK)	Jennifer	Bowman	jennifer_bowman@inhofe.senate.gov	Health LA
Sen. Isakson (R-GA)	Jordan	Bartolomeo	jordan_bartolomeo@isakson.senate.gov	Health LA
Sen. Johnson (R-WI)	Sean	Riley	sean_riley@ronjohnson.senate.gov	Health LA
Sen. Kaine (D-VA)	Kristen	Molloy	kristen_molloy@kaine.senate.gov	Health LA
Sen. King (I-ME)	Marge	Kilkelly	marge_kilkelly@king.senate.gov	Health LA
Sen. Klobuchar (D-MN)	Sarah	Smith	sarah_smith@klobuchar.senate.gov	Health LA
Lankford (I	Katherine	Wheeler	katherine_wheeler@lankford.senate.gov	Health LA
Sen. Leahy (D-VT)	Kathryn	Toomajian	kathryn_toomajian@leahy.senate.gov	Health LA
Sen. Lee (R-UT)	Leslie	Ford	leslie_ford@lee.senate.gov	Health LA
Sen. Manchin (D-WV)	Katherine	Cassling	katherine_cassling@manchin.senate.gov	Health LA
Sen. Markey (D-MA)	Avenel	Joseph	avenel_joseph@markey.senate.gov	Health LA
McCain (R-	David	Bennett	david_bennett@McCain.senate.gov	Health LA
Sen. McCaskill (D-MO)	Colleen	Bell	colleen_bell@mccaskill.senate.gov	Health LA
	Jennifer	Kuskowski	jennifer_conklin@mcconnell.senate.gov	Health LA
Sen. Menendez (D-NJ)	Michael	Barnard	michael_barnard@menendez.senate.gov	Health LA
Merkle	Susan	Lexer	susan_lexer@merkley.senate.gov	Health LA
Sen. Moran (R-KS)	Brian	Perkins	brian_perkins@moran.senate.gov	Health LA

Congressional Staff Invitees

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Committee on Ethics

U.S. Senate

PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressoinal Staff Invites for the Bipartisan Congressional Health Policy Conference March 3-5, 2017

Sen. Murkowski (R-AK)	Garrett	Boyle	Parrett bovle@murkowski senate gov	Health I A
Murphy (D-	Joe	Dunn	joe_dunn@murphy.senate.gov	
Sen. Murray (D-WA)	Nick	Bath		Health LA
Sen. Nelson (D-FL)	Corey	Malmgren	corey.malmgren@mail.house.gov	Health LA
Sen. Paul (R-KY)	Natalie	Burkhalter	natalie_burkhalter@paul.senate.gov	Health LA
Sen. Perdue (R-GA)	John	Eunice	john_eunice@perdue.senate.gov	Health LA
Sen. Peters (D-MI)	Greg	Mathis	greg_mathis@peters.senate.gov	Health LA
Sen. Portman (R-OH)	Sarah	Johnson	sarah_johnson@portman.senate.gov	Health LA
Sen. Reed (D-RI)	lliC	Brimmer	jill_brimmer@reed.senate.gov	Health LA
Sen. Risch (R-ID)	Rachel	Burkett	rache!_burkett@risch.senate.gov	Health LA
Sen. Roberts (R-KS)	Emily	Mueller	emily_mueller@roberts.senate.gov	Health LA
Sen. Rounds (R-SD)	Peter	Eckrich	peter_eckrich@rounds.senate.gov	Health LA
Sen. Rubio (R-FL)	Emily	Bouck	emily_bouck@rubio.senate.gov	Health LA
Sen. Sanders (I-VT)	Lori	Kearns	lori_kearns@sanders.senate.gov	Health LA
Sen. Sasse (R-NE)	Alyene	Senger	alyene_senger@sasse.senate.gov	Health LA
Sen. Schatz (D-HI)	Aimee	Grace	aimee_grace@schatz.senate.gov	Health LA
Sen. Schumer (D-NY)	Veronica	Duron	veronica_duron@schumer.senate.gov	Health LA
Sen. Scott (R-SC)	Charles	Cogar	charles_cogar@scott.senate.gov	Health LA
Sen. Sessions (R-AL)	Mary Blanche	Hankey	maryblanche_hankey@sessions.senate.gov	Health LA
Sen. Shaheen (D-NH)	Alison	MacDonald	alison_macdonald@shaheen.senate.gov	Health LA
Sen. Shelby (R-AL)	Dayne	Cutrell	dayne_cutrell@shelby.senate.gov	Health LA
Sen. Stabenow (D-MI)	Kim	Corbin	_	Health LA
Sen. Sullivan (R-AK)	Kate	Wolgemuth	kate_wolgemuth@sullivan.senate.gov	Health LA
Sen. Tester (D-MT)	Monica	Carmean	monica_carmean@tester.senate.gov	Health LA
Sen. Thune (R-SD)	Dennis	D'Aquila	dennis_d'aquila@thune.senate.gov	Health LA
Sen. Tillis (R-NC)	Katy	French Talento	katy_frenchtalento@tillis.senate.gov	Health LA
Sen. Toomey (R-PA)	Brad	Grantz	brad_grantz@toomey.senate.gov	Health LA
Sen. Udall (D-NM)	Lauren	Arias	lauren_arias@tomudall.senate.gov	Health LA
Sen. Van Hollen (D-MD)	Bill	Dauster	bill_dauster@vanhollen.senate.gov	Policy Director
Van Ho	Ziky	Ababiya	ziky_ababiya@vanhollen.senate.gov	Health LA
Sen. Warner (D-VA)	Marvin	Figueroa	marvin_figueroa@warner.senate.gov	Health LA

PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressoinal Staff Invites for the Bipartisan Congressional Health Policy Conference

March 3-5, 2017

Sen. Warren (D-MA)	Remy	Brim	remy_brim@warren.senate.gov	Health LA
Sen. Whitehouse (D-RI)	Jennifer	DeAngelis	jennifer_deangelis@whitehouse.senate.gov	Health LA
Sen. Wicker (R-MS)	Sarah	Lloyd Allred	sarahlloyd_allred@wicker.senate.gov	Health LA
Sen. Wyden (D-OR)	Thomas	Brunet	thomas_brunet@wyden.senate.gov	Health LA
Sen. Wyden (D-OR)	Elizabeth	Jurinka	elizabeth_jurinka@finance.senate.gov	Health LA
Sen. Todd Yound (R-IN)	Jaymi	Light	jaymi_light@young.senate.gov	Health LA
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JOHNNY ISAKSON, GEORGIA, CHAIRMAN CHRISTOPHER A. COONS, DELAWARE, VICE CHAIRMAN

PAT ROBERTS, KANSAS JAMES E. RISCH, IDAHO BRIAN SCHATZ, HAWAII JEANNE SHAHEEN, NEW HAMPSHIRE

DEBORAH SUE MAYER, CHIEF COUNSEL AND STAFF DIRECTOR EMILY GERSHON, CHIEF CLERK

TELEPHONE: (202) 224-2981 FACSIMILE: (202) 224-7416 TDD: (202) 228-J752

United States Senate

SELECT COMMITTEE ON ETHICS

March 2, 2017

The Honorable Tom Udall United States Senate Washington, DC 20510

Dear Senator Udall:

This responds to your recent correspondence concerning an invitation you and your spouse received to travel to the Bipartisan Congressional Health Policy Conference, in Warrenton, Virginia on March 3-5, 2017, sponsored by The Commonwealth Fund and the Alliance for Health Reform. The Commonwealth Fund and the Alliance for Health Reform certified to the Select Committee on Ethics (the Committee) that they will pay the necessary expenses¹ related to the travel and that they are neither lobbyists, nor lobbying firms, nor agents of a foreign principal, and are not otherwise acting as representatives or agents of a foreign government. The Commonwealth Fund and the Alliance for Health Reform certified that they do not retain or employ registered lobbyists or agents of a foreign principal, and that no registered lobbyist will accompany you at any point throughout your trip.²

Based on information and materials available to the Committee, and assuming the actual travel and travel-related expenses conform to the information and materials you provided, it appears that the proposed payment or reimbursement of necessary expenses for this trip may be accepted under relevant Senate Rules and the Committee's Regulations and Guidelines for Privately-Sponsored Travel, so long as at the time of the payment or reimbursement, neither The Commonwealth Fund nor the Alliance for Health Reform, is a registered lobbyist nor lobbying firm under the Lobbying Disclosure Act of 1995, nor an agent of a foreign principal under the Foreign Agents Registration Act (and is not otherwise acting as a representative or agent of a foreign government), and provided the travel and all required documents are disclosed to the Secretary of the Senate in accordance with the provisions of Senate Rules 34 and 35. Necessary expenses may include travel expenses for the spouse of a Member if the Member determines that the attendance of the spouse is appropriate to assist in the representation of the Senate.

Under Senate Rule 35, a Senator or officer who receives payment or reimbursement for necessary expenses related to fact-finding travel must disclose those expenses to the Secretary of the Senate by filing the completed Senators and Officers Post-Travel Disclosure of Travel Expenses (Form RE-3), along with a copy of the Private Sponsor Travel Certification Form, and

¹ The term "necessary expenses" has a specific definition. See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms at 8.

² The term "any point throughout your trip" has a specific definition. See id. at 2.

all relevant attachments (e.g., the private sponsor's invitation and itinerary) within 30 days of the conclusion of Privately-Sponsored Travel.

Finally, Senate Rule 34 requires a Member, on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$375 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their annual Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,

Deborah Sue Mayer

Chief Counsel and Staff Director

Enclosure: Travel Checklist

TOM UDALL

531 HART SENATE OFFICE BUILDING WASHINGTON, DC 20510 (202) 224-6621 (202) 228-3261 FAX http://tomudall.senato.gov

United States Senate

WASHINGTON, DC 20510

COMMITTEES: APPROPRIATIONS

COMMERCE, SCIENCE, AND TRANSPORTATION

FOREIGN RELATIONS

INDIAN AFFAIRS

RULES AND ADMINISTRATION

February 13, 2017

U.S. Senate Select Committee on Ethics 220 Hart Building United States Senate Washington, DC 20510

To Whom It May Concern:

Please find, attached, my request for approval for privately sponsored travel to participate in the 2017 Bipartisan Congressional Health Policy conference in Warrenton, VA.

If you have any questions or need further information about my participation, please contact Devon Wohl, a member of my staff at 202.224.9420 or devon wohl@tomudall.senate.gov.

Sincerely,

Tom Udall

United States Senator

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PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

Spo	nsor(s) of the trip (please list all sponsors): Alliance for Health Reform a non-partisan 501(c)(3)
	olic charity and The Commonwealth Fund, a foundation that supports independent (continued)
De	scription of the trip:
	tes of travel: Friday, March 3 - Sunday March 5, 2017
	ce of travel:
	me and title of Senate invitees: See attached list of Senate Invitees
I c	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
×	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal. -AND-
×	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement. AND
3	The traveler will not be accompanied on the trip by a registered lobby ist or agent of a foreign principal

except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a

(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one

OR -

(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two

overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the

Member, officer, or employee on any segment of the trip (see questions 6 and 10).

overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member,

USE ONLY IF YOU CHECKED QUESTION 6(B)

foreign principal, one of the following scenarios applies:

officer, or employee on any segment of the trip.

9.

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(see attached page)				
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Total Expenses for Ea	ach Participant:			
	Transportation	Lodging	Meal	Other
	Expenses	Expenses	Expenses	Expenses
	\$26	\$188	\$170.30	\$20; folder with materials
Good Faith estimate				materials
Amounts				
Amounts				
participation or b) the congressional particip	rip involves an event that e trip involves an event the pation: specifically with regard to	nat is arranged or or	ganized specifically	
participation or b) the congressional particip	e trip involves an event the pation:	nat is arranged or or	ganized specifically	
participation or b) the congressional participation. This trip is organized	e trip involves an event the pation:	at is arranged or or or congressional par	ganized specifically	
participation or b) the congressional participation. This trip is organized	e trip involves an event the pation: specifically with regard to	at is arranged or or or congressional par	ganized specifically	
participation or b) the congressional participation. This trip is organized. Reason for selecting to the congression of the c	e trip involves an event the pation: specifically with regard to	at is arranged or or or congressional par	ganized specifically	
participation or b) the congressional particip. This trip is organized. Reason for selecting to (see attached page)	e trip involves an event the pation: specifically with regard to the location of the event of t	o congressional par	ganized specifically	
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participation or b) the congressional particip. This trip is organized. Reason for selecting to (see attached page). Name and location of	the location of the event of those or other lodging fa	o congressional par	ganized specifically	
participation or b) the congressional particip. This trip is organized. Reason for selecting to (see attached page). Name and location of Airlie; 6809 Airlie Road.	the location of the event of those or other lodging fa	o congressional par	ganized specifically	
participation or b) the congressional particip. This trip is organized. Reason for selecting to (see attached page). Name and location of Airlie; 6809 Airlie Road.	the location of the event of the hotel or other lodging factor of the ad Warrenton, VA 20187	o congressional par	ganized specifically	

Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:
The lodging rate for Warrenton, VA according to GSA is \$94.00 per night. Our rates at Airlie are currently,
\$94/night. Our meal costs are also within the GSA total for three days in Warrenton, VA.
Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:
The Alliance will organize chartered buses to allow for members and staff to all meet at a central location
on Capitol Hill for travel to/from Airlie to decrease costs. Members and staff may also drive themselves.
I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).
List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:
NA
I hereby certify that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.): Signature of Travel Sponsor:
Name and Title: Sarah Dash, President and Co-CEO
Name of Organization: Alliance for Health Reform
Address: 1444 I St NW, Suite 910, Washington, DC 20005
Telephone Number: (202)789-2300
Fax Number: (202)789-2233
Tax Nullioci.

25. I hereby certify that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor):

Signature of Travel Sponsor:

Name and Title: David Blumenthal, President Name of Organization: The Commonwealth Fund Address: One E. 75th St. New York, NY 10021

Telephone Number: (212) 606-3500 Fax Number: (212) 606-3500 E-mail Address: db@cmwf.org

Continued answers from Questions 2, 13, 14, 15, 18, and 20

1. SPONSOR(S) OF THE TRIP (PLEASE LIST ALL SPONSORS)

Alliance for Health Reform, a non-partisan501(c)3 public charity, and The Commonwealth Fund, a foundation that supports independent research on health and social issues and makes grants to improve health care practice and policy.

2. DESCRIPTION OF THE TRIP:

The conference provides an opportunity for members of Congress and their senior health staff from both parties to learn more about timely health policy topics in informal, off-the-record sessions with a select group of health policy experts from a wide variety of perspectives. There is also ample opportunity for interchange among the Members of Congress in attendance. The event aims to educate, not to advance any political or ideological position.

13. BRIEFLY DESCRIBE THE STATED MISSION OF EACH SPONSOR AND HOW THE PURPOSE OF THE TRIP RELATES TO THAT MISSION:

The Alliance is a non-partisan, 501(c)(3) public charity dedicated to providing governmental leaders with expert analysis and information on current health care-related issues, solutions, legislative proposals and industry conditions. The Alliance has been a resource providing objective, fact-based, unbiased information to members of the Senate/House on both sides of the aisle since its inception in 1991. The Commonwealth Fund is a foundation that supports independent research on health and social issues and makes grants to improve health care practice and policy. Since the purpose of the trip is to educate leaders about the roots of the nation's health care problems and the competing proposals for changing the system in ways that will help improve health care practice and policy, the trip fits perfectly into the mission of both organizations.(allhealth.org) (cmwf.org)

14. BRIEFLY DESCRIBE EACH SPONSOR'S PRIOR HISTORY OF SPONSORING CONGRESSIONAL TRIPS:

This is the 19th Annual Bipartisan Congressional Health Policy Conference to which members of the Senate and House of Representatives have been invited and have participated. In all, there have been 50 unique members who have attended since the Alliance and The Fund began jointly sponsoring the event in 2006. From 1995-2005, The Commonwealth Fund sponsored the conference with the Kennedy School of Government at Harvard.

15. BRIEFLY DESCRIBE THE EDUCATIONAL ACTIVITIES PERFORMED BY EACH SPONSOR (OTHER THAN SPONSORING CONGRESSIONAL TRIPS):

The Alliance has a long history of performing educational activities. Since 1991, the Alliance has organized more than 500 forums in Washington and around the nation, each presenting a balance of expert views. The Alliance has published comprehensive guides for journalists on covering health issues and regularly produces online toolkits on current topics.

18. REASON FOR SELECTING THE LOCATION OF THE EVENT OR TRIP

The location was selected because of a need to balance proximity to Capitol Hill in order to accommodate the schedules of Members and staff and achieve our goal of reduced travel costs by allowing for bus or carpooling as the mode of transportation and yet be located outside of the Senate duty station. The Airlie is located in Fauquier County, Virginia.

The Alliance for Health Reform, in close collaboration with the Commonwealth Fund, undertook an extensive search of properties that met several key criteria:

- Location: Located a reasonable driving distance from Washington, D.C. and major airports for the convenience of Members of Congress and participating speakers, yet outside of the Washington, D.C. "duty station" for Members of Congress and their staff. The Airlie is located at 6809 Airlie Road in Warrington, Virginia, approximately 40-60 minutes from Dulles Airport (depending on traffic), and a 1-2 hour drive from the Capitol, depending on traffic. It is located in Fauquier County, Virginia. Other facilities we considered were either a significant driving distance from the
- Facilities and logistics: Conference facilities and rooming arrangements that can
 accommodate the conference; criteria include as space that can ensure safety and privacy for
 the Members, and any other high profile speakers that attend; meeting space and overnight
 accommodations that are located on the same property so as not to add additional travel time
 and distract from substantive programming; suitability of conference facilities and A/V capacity;
 and conference support staff that's suitable for hosting a conference as large and logistically
 complex as ours.
- Cost: Reasonable costs that can meet the conference budget. The Alliance has negotiated the lowest possible food costs at Airlie, selecting the most reasonable food costs on the available menu. These are the market rates for conference facilities that meet all of our criteria.
- Timing: preferred date availability to coincide with anticipated congressional availability

After this extensive search and a site visit by Alliance and Fund staff, we believe Airlie is the best option for the 2017 conference.

Other facilities considered: A list of additional properties considered for the conference is shown below. Highlighted properties were visited but found not to have adequate facilities for our conference, and other conference facilities were assessed via internet and phone research. Many of the other venues listed do not have adequate facilities for our conference or are a longer drive from major airports than the Airlie, potentially creating an obstacle to attendance by Members of Congress, making it more difficult to recruit top-quality speakers, and increasing transportation costs. The other venues with appropriate facilities had comparable or more expensive food costs compared to the Airlie.

20. REASONS(S) FOR SELECTING HOTEL OR OTHER LODGING FACILITY

In addition to a location that met the goals described in 18, above, we sought a facility that was low cost yet had sufficiently capable conference facilities and staff with modern audio/visual accommodations. The Airlie meets those needs. It has an excellent reputation for its conference management services with a highly qualified staff. Yet it is by no means luxurious. It is modestly comfortable which will facilitate the number of hours that conference participants will participate in learning sessions and issue discussions.

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U.S. Senate

Commitee on Ethics

PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressional Invitees for the Bipartisan Congressional Health Policy Conference

March 3-5, 2017

First Name	Last Name	Credentials		Reason for Invitation
		010401111410	AK	Member of Committee on Health, Education, Labor & Pensions
Lisa	Murkowski		AK	Member of Senate Veterans' Affairs Committee
Dan	Sullivan		AL	Member of the Senate Rural Health Caucus
Jeff	Sessions		 	Member of the Senate Cancer Coalition
Richard	Shelby		AL_	Member of Senate Appropriations Committee
John	Boozman		AR	Member of Joint Economic Committee
Tom	Cotton	·	AR	
Jeff	Flake	<u> </u>	AZ	Member of Senate Judiciary Committee
John	McCain		AZ	Member of the Senate Rural Health Caucus
Kamala	Harris		CA	Member of the Senate Committee on Budget
Dianne	Feinstein		CA	Member of the Senate Cancer Coalition
Michael	Bennet		CO	Member of Committee on Health, Education, Labor & Pensions
Cory	Gardner		co	Member of Senate Committee on Small Business and Entreprenuership
Richard	Blumenthal		CT	Member of Senate Judiciary Committee
Christopher	Murphy		СТ	Member of Committee on Health, Education, Labor & Pensions
Thomas	Carper		DE	Member of Committee on Finance
Chris	Coons		DE	Member of Senate Appropriations Committee
Bill	Nelson		FL	Member of Committee on Finance
				NATIONAL OF THE COMMITTEE OF Small Business and Entreprenuership
Marco	Rubio		FL GA	Member of Senate Committee on Small Business and Entreprenuership Member of Committee on Health, Education, Labor & Pensions
Johnny	Isakson	· 		Member of Senate Budget Committee
David	Perdue		GA_	Member of Senate Veterans' Affairs Committee
Mazie	Hirono		HI	Member of Senate Appropriations Committee
Brian	Schatz		HI -	
Charles	Grassley		<u>IA</u>	Member of Committee on Finance
Joni	Ernst		IA	Member of Senate Committee on Small Business and Entreprenuership
Michael	Сгаро		ĪD	Member of Committee on Finance
Jim	Risch		ID	Member of Congressional Multiple Sclerosis Caucus
Richard	Durbin		IL	Member of the Senate Cancer Coalition
Tammy	Duckworth	- 	IL IL	Interest in Health Care
Tallilly	Duckworth			Member of Senate Committee on Health, Education, Labor, and
Todd	Young		IN	Pensions
Joe	Donnelly		IN	Member of Coalition for Autism Research and Education (CARE)
Jerry	Moran		KS	Member of Senate Appropriations Committee
Pat	Roberts		KS	Member of Committee on Health, Education, Labor & Pensions
Mitch	McConnell		KY	Member of the Senate Rural Health Caucus
Doord	Paul	MD	KY	Member of Committee on Health, Education, Labor & Pensions
Bill	Cassidy	MD	LA	Member of Committee on Health, Education, Labor & Pensions
Elizabeth	Warren		MA	Member of Committee on Health, Education, Labor & Pensions
Edward	Markey		MA	Member of Coalition for Autism Research and Education (CARE)
			MD	Member of Committee on Finance
Benjamin	Cardin		MD	Member of Committee on Appropriations
Chris	Van Hollen		ME	Member of Committee on Health, Education, Labor & Pensions
Susan	Collins	<u> </u>	ME	Member of Senate Budget Committee
Angus	King			Member of Joint Economic Committee
Gary	Peters		MI	Member of Committee on Finance
Debbie	Stabenow		MI	Member of Committee on Health, Education, Labor & Pensions
Al	Franken		MN	
Amy	Klobuchar		MN	Member of Senate Judiciary Committee
Roy	Blunt		MO	Member of Senate Appropriations Committee
Claire	McCaskill		MO	Member of Congressional Caucus for Women's Issues
Thad	Cochran		MS	Member of the Senate Rural Health Caucus
Roger	Wicker		MS	Member of Senate Budget Committee
Steve	Daines		MT_	Member of Senate Appropriations Committee
Jon	Tester		MT	Member of the Senate Rural Health Caucus

First Name	Last Name	Credentials	State	Reason for Invitation
Richard	Burr		NC	Member of Committee on Health, Education, Labor & Pensions
Thom	Tillis		NC	Member of Senate Judiciary Committee
John	Hoeven		ND	Member of Senate Appropriations Committee
Heidi	Heitkamp		ND	Member of Senate Diabetes Caucus
Deb	Fischer		NE	Member of Congressional Caucus for Women's Issues
Ben	Sasse		NE	Member of Joint Economic Committee
Maggie	Hassan		NH	Member of Committee on Health, Education, Labor & Pensions
Jeanne	Shaheen		NH	Member of Senate Appropriations Committee
Robert	Menendez		NJ	Member of Committee on Finance
Cory	Booker		NJ	Member of Senate Committee on Small Business and Entreprenuershi
Martin	Heinrich		NM	Member of Joint Economic Committee
Tom	Udall	- 	NM	Member of Senate Appropriations Committee
Dean	Heller	<u> </u>	NV	Member of Committee on Finance
Catharine	Cortez Matso	<u> </u>	NV	Member of Senate Special Committee on Aging
Charles	Schumer		NY	Member of Committee on Finance
			NY	Member of the Congressional Task Force on Alzheimer's Disease
Kirsten Sherrod	Gillibrand		ОН	Member of Committee on Finance
Snerroa Rob	Brown Portman		ОН	Member of Committee on Finance
	_		ÖK	Member of the Senate Rural Health Caucus
James	Inhofe	<u>-</u>	OK	Member of Senate Appropriations Committee
James	Lankford	 	OR	Member of Senate Appropriations Committee
Jeff Dan	Merkley			Member of Committee on Finance
Ron	Wyden	-	OR	Member of Committee on Health, Education, Labor & Pensions
Bob	Casey		IPA DA	
Patrick	Toomey		PA	Member of Committee on Finance
Jack	Reed		RI	Member of the Senate Cancer Coalition
Sheldon	Whitehouse		RI	Member of Committee on Health, Education, Labor & Pensions
Lindsey	Graham		SC_	Member of the Senate Rural Health Caucus
Tim	Scott		ISC	Member of Committee on Health, Education, Labor & Pensions
Mike	Rounds		ISD	Member of Senate Veterans' Affairs Committee
<u>John</u>	Thune		SD	Member of Committee on Finance
Lamar	Alexander	<u> </u>	TN	Member of Committee on Health, Education, Labor & Pensions
Bob	Corker		TN	Member of the Senate Rural Health Caucus
<u>John</u>	Cornyn	<u> </u>	TX	Member of Committee on Finance
Ted	Cruz		TX	Member of Joint Economic Committee
Orrin	Hatch		UT	Member of Committee on Health, Education, Labor & Pensions
Mike	Lee		UT	Member of Senate Judiciary Committee
Tim	Kaine		VA	Member of Senate Budget Committee
Mark	Warner		VA_	Member of Committee on Finance
Patrick	Leahy		VT	Member of the Senate Rural Health Caucus
Bernard	Sanders		VT	Member of Committee on Health, Education, Labor & Pensions
Maria	Cantwell		WA	Member of Committee on Finance
Patty	Murray		WA	Member of Committee on Health, Education, Labor & Pensions
Tammy	Baldwin		W	Member of Committee on Health, Education, Labor & Pensions
Ron	Johnson		WI	Member of Senate Budget Committee
Shelley	Capito		W	Member of Senate Appropriations Committee
Joe	Manchin		W	Member of Senate Veterans' Affairs Committee
***	Barrasso	MD	WY	Member of the Senate Rural Health Caucus
John			WY	Member of Committee on Health, Education, Labor & Pensions

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U.S. Senate Sommittee on Ethics

PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressoinal Staff Invites for the Bipartisan Congressional Health Policy Conference

March 3-5, 2017

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Sen. Blumenthal (D-CT)	Laurel	Sakai	laurel sakai@blumenthal.senate.gov	Health LA
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Sen. Cassidy (R-LA)	Matthew	Gallivan	matt_gallivan@cassidy.senate.gov	Health LA
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U.S. Senate Committee on Ethics

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List of Congressoinal Staff Invites for the Bipartisan Congressional Health Policy Conference

March 3-5, 2017

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Congressional Staff Invitees

U.S. Senate Committee on Ethics

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List of Congressoinal Staff Invites for the Bipartisan Congressional Health Policy Conference

March 3-5, 2017

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PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressoinal Staff Invites for the Bipartisan Congressional Health Policy Conference

March 3-5, 2017

Sen. Warren (D-MA)	Remy	Brim	remy_brim@warren.senate.gov	Health LA
Sen. Whitehouse (D-RI)	Jennifer	DeAngelis	jennifer_deangelis@whitehouse.senate.gov	Health LA
Sen. Wicker (R-MS)	Sarah	Lloyd Allred	sarahlloyd_allred@wicker.senate.gov	Health LA
Sen. Wyden (D-OR)	Thomas	Brunet	thomas_brunet@wyden.senate.gov	Health LA
Sen. Wyden (D-OR)	Elizabeth	Jurinka	elizabeth_jurinka@finance.senate.gov	Health LA
Sen. Todd Yound (R-IN)	Jaymi	Light	jaymi_light@young.senate.gov	Health LA





Bipartisan Congressional Health Policy Conference Airlie Center, Warrenton, Virginia March 3-5, 2017

Achieving a Patient-Centered Health System

(DRAFT 1/13/17 – all speakers confirmed unless otherwise noted)

Friday,	March	3
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6:00-7:00 p.m.

Opening Reception

7:00-9:00 p.m.

Dinner

1a. Welcome and Introductions

1b. Patients as Innovation Partners: A Charge for the Weekend

Keynote Speakers:

- Steven Keating, research affiliate, Massachusetts Institute of Technology
- Sharon Terry, President and Chief Executive Officer, Genetic Alliance

Saturday, March 4

8:00-8:45 a.m.

2. Breakfast: Building Delivery Systems with the Patient at the Center

Panelists:

- Whitney Bowman-Zatzkin, Director, Flip the Clinic
- K. Eric De Jonge, Director of Geriatrics, MedStar Washington Hospital
 Center

9:00-10:15 a.m.

3. Medicare and Chronic Disease

Panelists:

- Ken Thorpe, Chairman, Partnership to Fight Chronic Disease, and Robert
 W. Woodruff Professor and Chair, Department of Health Policy and
 Management, Rollins School of Public Health, Emory University
- Rebecca Onie, Co-Founder and Chief Executive Officer, Health Leads
- Michael Le, Co-Founder and Chief Medical Officer, Landmark Health

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10:15 -11:30 a.m.

4. Caring for Dually Eligible Medicare-Medicaid Patients

Panelists:

- Melanie Bella, Independent Consultant (invited)
- Cindi Jones, Director, Department of Medical Assistance Services,
 Commonwealth of Virginia
- TBD

11:45 -1:00 p.m.

5. Lunch Discussion: Prescription Drug Spending and Policy – Where Are We and Where Are We Headed?

Keynote Speakers:

- Mark McClellan, Director and Robert J. Margolis, MD, Professor of Business, Medicine and Health Policy, Duke University (invited)
- Henry Waxman, Chairman, Waxman Strategies

1:15-2:15 p.m.

6. Continuing the Conversation: Ensuring Patient Access to Affordable Prescription Drugs

Panelists:

- Elizabeth Seeley, Adjunct Lecturer on Health Policy and Management,
 Harvard T.H. Chan School of Public Health
- Aaron Kesselheim, Associate Professor, Harvard Medical School, and Faculty Member, Brigham and Women's Hospital
- Diana Zuckerman, President, National Center for Health Research

2:15-3:30 p.m.

7. Democratization of Health Data: Getting Usable Health Information in the Hands of Patients and Caregivers

Panelists:

- Karen DeSalvo, Acting Assistant Secretary of Health, U.S. Department of Health and Human Services (invited)
- Christine Bechtel, President, Bechtel Health Advisory Group
- Jeremy Marut, Director of Enterprise Architecture, Hackensack University
 Medical Center
- Jim Jirjis, Chief Health Information Officer, Vice President Clinical Services Group, HCA

7:00-7:45 p.m.

Reception

8:00-9:15 p.m.

8. Dinner Keynote: Patient-Centered Research: Forging New Paths

Keynote Speaker:

 Eric Dishman, Director, All of Us Research Program, National Institutes of Health (invited)

Sunday, March 5

8:15-9:00 a.m.

Breakfast Buffet

9:00-10:30 a.m.

9. Charting the Future of Medicaid and the Role of the States

Panelists:

- Frederick Isasi, Division Director, National Governors Association Center for Best Practices
- Joe Moser, Director, Indiana Medicaid
- Thomas Betlatch, Director, Arizona Health Care Cost Containment System

10:30-12:00 pm

10. Stabilizing the Private Insurance Market

Panelists:

- Joel Ario, Managing Director, Manatt Health
- Cori Uccello, Actuary and Senior Health Fellow, American Academy of Actuaries
- Avik Roy, Opinion Editor, Forbes

12:00 p.m.

Closing Remarks

12:15 p.m.

Adjourn